eRA Commons Working Group (CWG) Meeting Notes

Meeting Details: **Next Meeting:**

Tuesday, January 12, 2016   **Friday**, May 6, 2016
1:00-3:00 p.m.   1:00-3:00 p.m.
Room: Lobby Level,   Room: TBA
Congressional A   Hyatt Regency Washington
Hyatt Regency Washington   400 New Jersey Ave, NW
400 New Jersey Ave, NW   Washington, DC 20001
Washington, DC 20001
Map and Directions
Floor Plan

Meeting Notes:

1. **eSubmission Update**
   Facilitator: Jessie Floura
   - Validation Services
     o Moved from maintaining two validations documents to one now that all single project applications have been transitioned to ASSIST
   - Documentation Schedule & Agile Development
     o All of eRA is now using the Agile model of software development
     o Means continuous updates to validation document
     o Updates happen in 2 week intervals
     o Changes will be documented and communicated on a regular basis (every 2 weeks)
     o **Question**: Does the Agile model of development (short, condensed code development, followed by releases to production every few weeks) have negative effect to S2S development?
     o **Answer**:
       ▪ No, but they do care and a need to know what is changing
       ▪ Having updated validations documentation helps
       ▪ What order does this happen? Is production being updated every 2 weeks?
         • No, every two weeks changes are made in development environment, production releases happen at a longer time interval and each quarter
   - ASSIST Update: Notifications & Administrative Processes
     o Now open to all Activity Codes.
     o Changes coming on how Notifications are handled
     o Changes in Managed Access coming, still being reviewed by policy
     o **Concern**: It was overheard, or rumored, that ASSIST would be required in the future for all applications.
     o **Response**:
       ▪ There are NO plans to make ASSIST required, it is just one of several options
       ▪ S2S and submission directly to Grants.gov will continue to be available
       ▪ Challenge is to effectively communicate all the options, including now, Grants.gov Workspace
     o **Suggestion**: Gather statics about the increased use of ASSIST, share via Sheri's Items of Interests, or other communication mechanisms
       ▪ Just had first Small Business submission date where ASSIST was available. Approximately 20% of the submission came in via ASSIST

2. eRA Commons Update
Facilitator: Scarlett Gibb

- Review from last meeting:
  - Closeout changes went into effect
    - New Closeout Email address on Institutional Profile
    - Time for closeout process extended from 90 to 120 days
    - Due Dates updated based on the above information
  - New FFR interface released
    - No complaints so must be good
- Coming soon, new Principal Investigator Status screen UI
  - Grants group in families
  - Active to least active
  - Easier to read, cleaner look, less clutter
  - Please provide feedback to [Scarlett](#)
- Coming soon, new mobile PI Status access
  - Already requests from pilot for delegates to have access
- Account Management System
  - First phase will be implemented later this month
- Prior Approval for Withdrawal and $500K
  - Should see this come February
  - **Question from Scarlett**:
    - Which would be better? Having approval assigned to a specific Signing Official, or
    - Route to generic email address?
      - Which address?
      - Add a new specific address?
      - Use the NoA address?
        - Default to NoA unless a Prior Approval Address is given
    - **Response**: Generic or Institutional address, it can monitored by many
- Partner Agency Access
  - Other government agencies continue to partner with eRA looking to leverage the many features of eRA Commons
    - SAMHSA is coming on board
    - CDC will be using ASSIST for single and multi-project applications
    - AHRQ uses Commons for reporting (RPPR, FRR, FCOI, etc.)
    - FDA and the VA both continue to use eRA as well
  - Challenge with Financials is that each agency calculates values differently
    - We have run into some bugs, but fixes are being worked on.
    - Please be sure to report any issues you encounter

- Administration changes for delegations and privileges to provide flexibility on what users can do
  - It is still on the list
  - Discussions around what would be the best approach
- Federated Login
  - Looking for volunteers to who's institution is a member to provide institutional accounts
  - Please contact [Scarlett](#) to assist
- **Question from Group**: Could Closeout information be available as a web service?
  - **Answer**: Possibly, will need to examine concept more closely

- **Question from Group**: FFR information… Could an upload option be included? Instead of keying in data?
  - o **Answer**: Possibly. Might be a good time to have a discussion as to what things could be provided as a web service, API
- New Commons Home Page coming in March
  - o New look to match the new UI design, cleaner, easier to read

3. Signing Official Status Screen Redesign
   Facilitators: Yuri Gorbach and Scarlett Gibb
- Looking for ways to consolidate search screen
  - o What search options are used?
  - o What is not used?
  - o What can be eliminated from the field options? **Suggestion**: Get rid of Budget Start Date!
- What fields might be able to be combined?
- Quick Search by Action?
  - o **Suggestion**: Allow search by Competing vs Non-Competing
- How to best see search results?
  - o Grouping/Families as in new PI Search Results screen? (January Release)
- Would the administrative users like to have a quick way to see all grants that have RPPRs or Inclusion or other actions that requiring their attention?
  - o If yes, how would the data set be sorted (Latest or Longest in the status?)
- Looking to conduct some webinars for feedback, input, and suggestions.
- **Two Questions from Yuri:**
  - o *How many people and how often search on 'Accession Number' is used by folks?*
  - o *If not widely used, should it remain in search results for each returned record?*
- If you have ideas, or want to participate in a focus group/webinars, please contact Scarlett.
- If you have suggestions, answers to the questions above, also please contact Scarlett.

4. FCOI Specific Email Address in Institutional Profile?
   Facilitator: Scarlett Gibb
- **Question to Group**: Would a specific email address field on the Institutional Profile (IPF) be helpful?
  - o **Answer**: Yes
- **Question to Group**: Is there anyone else who should receive communications regarding FCOI, for example the person who submitted the report?
  - o **Answer**: By default, the messages go to the specified address in the institutional profile, but provide a checkbox to CC the report submitter. If the field in the profile is blank, it defaults to the submitter.

5. Application Guide Update
   Facilitator: Stefanie Harris
- Looking to restructure and simplify the Application Guide
- Collated more than 120 responses from the RFI that was posted in the fall
  - o All responses in favor of a change in the structure of the Application Guide
- Some of the ideas that are being developed:
  - o Make it a web page (vs PDF)
  - o Searchable or filterable based on different variables (Activity Codes, Key Words, etc.)
  - o Develop an Application Guide Wizard
    - ▪ put in info such Activity Code, FOA information, and the system returns an appropriate instruction book, printable if desired
- First changes will be seen in FORMS-D in March of 2016 for use with May 25 submission date and beyond
  - o First iteration will include a web based application guide, with navigation based on specific forms , and several mechanism-specific PDF guides ('filtered' content for research, training, career fellowship, and multi-project)
    - ▪ Changes in forms and policies will be highlighted
    - ▪ 2 major audiences to consider

- PIs – who want to just know "what do I put here...?"
  Administrators – who need a bigger view and understanding of the process/policy
- Other ideas
  - Parse out parts based on Forms, selecting the forms you need to use for a specific application
  - Keep dedicated web pages for things that are common to all applications
    - Peer Review
    - Formatting
    - Registrations, etc.
- Always have available one complete Application Guide in PDF format – this means all form instructions, not things like peer review/formatting/registrations
- **Concern**: Having to navigate to multiple places to get the needed information
  - **Response**: This has been recognized and much of the development is how to best guide people, show them the way, to get to the information they need/want.
- **Question to Group**: Would some kind of checklist be of help?
  - **Answer**: Yes
- Look for lots of communications coming over the next couple months.
- Be prepared to provide feedback as requested.
- **Concern**: Many folks Google Application Guide. It is hard to know from the search results which is the correct version.
- **Response**: Would a condensed version of the Guide with links to the current, correct info be better than a large document with all the information?
- **Concern with this approach**: Might be easy to get lost in a "link" forest (link to link to link...)
- **Other Suggestions**:
  - Make sure page limits are highlighted and near the beginning of a section
  - Make form images open in a separate window, allowing for text and images to be side-by-side
  - Highlight changes better between versions, what is old and what is new
- Team is working on:
  - A new numbering format
    - New format will associate a form with an instructional page/section
    - And forms with application packages
  - Working on a way differences/changes in are noted or highlighted, from instructions, form fields and for different FOAs
  - Working version control to differentiate between older and newer versions of the Application Guide
- **Question to Group**: What should the new guide be called?
  - Comprehensive Guide?
  - General Guide?

6. General Discussion/Wrap-up
Facilitator: Megan Columbus

Other Questions:
- Would NIH be open to feeding certificate information for Human Subject training electronically for JIT requests?
  - Some sort of web service, API, would be needed
  - Two separate systems
- Where would it go?
  - Add to Personal Profile form
- Need to know better what information GMS are looking for

Future agenda idea:
- What web services, or APIs would be helpful?
  - Data for FCOI? RPPR? Certificates and Assurances? Etc.

xTRAIN:
- xTRAIN would benefit from a more robust search feature
- Need a way to identify past due terminations & outstanding appointees